

## INSTRUCTIONS FOR COMPLETING THE FORM INPUT SHEET

The form input sheet is to be filled out for each form and then forwarded along with four actual samples of the form to the agency records coordinator.

1. **State Form Number** – DO NOT FILL THIS IN. This number is assigned by the Office of Administration, Forms Management.
2. **Form Title** – If no title exists, develop a form title from the key word list (see page 2). The title should be concise and descriptive of the function of the form. It should also be as unique as possible. The 31 digit input version of the title should clearly represent the title of the form. For envelopes the size and type should be included in the title. (i.e., 10W indicates a number 10 window envelope).
3. **Catalog Number** – LEAVE THIS BLANK. It is filled in by Forms Management.
4. **Analysis Code** – The analysis code is taken from the keyword list (see page 2). The keyword list is divided into three sections. Pick one number from each section. When they are put together they should make a phrase describing the function of the form.
5. **Class** – The following class codes should be used:
  - 1-Contract printing job (vendor)
  - 2-Non-contract printing job (i.e., University of Missouri Press)
  - 3- Computer "flushed" job
  - 4-Agency produced job
  - 5-MCI produced job (Prison Industries)
  - 6-State Printing produced job (including Office of Administration copy center)
6. **Taxpayer Impact Status:**
  - C - Completed in whole or part by taxpayer
  - (blank) no direct impact to the taxpayer
7. **Number of Parts** – Enter the number of parts of each page and not the number of pages. (Number of parts refers to NCR paper or carbon interleave paper" 2-part – white, canary; 3-part – white, canary, pink; etc.)
8. **Construction of the Form**

01 – Single flat sheet	13 – Triple Window Envelopes
02 – Continuous	14 – Letterheads
04 – Unit sets (several different pages to a set)	16 – Tags/Labels
06 – Multi-part/Multi-color (carbon or carbonless)	18 – Checks
08 – Form letters	20 – Ledgers
10 – Receipts	22 – Booklets/Listings/Reports
11 – Double Window Envelopes	99 – Not elsewhere classified
12 – Envelopes	
9. **Size of the Form**

02 – Larger than 8 ½ x 14 (white)	14 – 8 ½ x 14 (color) (or multi-color)
04 – 8 ½ x 14 (white)	16 – 8 ½ x 14 (color) (or multi-color)
06 – 8 ½ x 11 (white)	18 – 8 ½ x 14 (color) (or multi-color)
08 – 8 ½ x 5 ½ (white)	20 – Smaller than 8 ½ x 5 ½ (color)
10 – Smaller than 8 ½ x 5 ½ (white)	99 – Not elsewhere classified
12 – Larger than 8 ½ x 14 (color)	
10. **Effective or Revised Date** – Effective date refers to when the form was first created. Revision as defined for use here includes *any* change in forms design or construction. (Use the most recent date.)
11. **Change Pending** – For Forms management use only.  
*\*Please let someone know if a form is obsolete.*
12. **Old Form Number** – This is used for the agency form number if different from the state form number.
13. **Annual Usage** – Enter number of thousands expected to be used per year. (Sample: 10,000 would be 10. If less than 1,000, mark – 1.)
14. **Retention Schedule Reference** – Enter here the number of the schedule from the Records Retention Schedule (as outlined by the Secretary of State.)
15. **How is Form Completed?**
  - W – Form is filled out by hand.
  - X – Form is filled out by typewriter.
  - Y – Both
  - Z – Other (computer generated, etc.)
16. **Window Envelope Used?**
  - 1 – Yes, form is used with a window envelope.
  - 2 – No, not used with a window envelope.
  - 3 – Double window envelope used.
  - 4 – Triple window envelope used.

17. **Agency, Division, Unit** – Indicate the agency name, divisions and units that use this form.
18. **Other Impacted Units** – List any unit that must add or extract information from the form specifically including data entry or retention of a multi-part form. Leave blank if there is no impact on other agencies.
19. **What Does This Form Do?** – The thrust here is the defining of the real function of the form. The key is what specific action is initiated by this form. An example of a poor response for the Forms Input Sheet is "It provides approval of forms." A better response would be: "It provides justification of forms for the approval decision and inputs key information to the computer." The second related the actions generated by the form more clearly.
20. **What Requires This Form?** – Is it required by a law, rule or other reason? The specific law or rule should be written down.
21. **Who Completes It?** – Make note of forms completed by more than one unit, and also include the source of information, noting form numbers of specific source documents.
22. **Who Uses It?** – For multi-used forms, include all major users, and as many minor users as possible. Also note how the information is used.
23. **Distribution, Routing and Justification. Route to** – enter the ultimate recipient unit or agency.  
**Justification** – This is the justification for receiving and retaining the form. "Information" is not an acceptable justification. "For federal audit" is the type of justification that should be entered.

### KEYWORD LIST

Function Keywords	Operation/Condition Keywords		Subject Keywords	
02 To acknowledge	01 Absence of	50 Insurance of	01 Accidents	53 Payroll & Time Keeping
04 To apply	02 Acceptance of	51 Investigation of	02 Accounts	54 Permits & Licenses/ Credit Cards
06 To assign	03 Addition to	52 Issuance of	03 Advertising	55 Product/Merchandise
08 To authorize	04 Adjustment of	53 Lease of	05 Applicant/Claimant	57 Projects/Job
10 To cancel/reject	05 Aging of	55 Location of	06 Appropriations	58 Publications
12 To certify/verify	07 Allocation of	56 Loss of	07 Audit	59 Records & Non Data Processing Files
14 To claim	08 Analysis of	57 Movement of/Release	09 Banking	61 Files
16 To encumber	09 Application for/of/ Request for	58 Operation of	10 Beneficiaries	62 Safety
18 To establish	10 Approval of	59 Ownership of	11 Benefit Plans	63 Salvage
20 To estimate	11 Assignment of	61 Payment of	13 Bonds & Debts	65 Student
22 To follow up	13 Attendance of	62 Procurement of	14 Budgets	66 Taxes/Fees/Fines/ Penalties
24 To identify	14 Audit of	63 Production of	15 Buildings & Facilities	67 Taxpayers
26 To instruct	15 Availability of	64 Recall of	17 Cash	69 Training
28 To justify	16 Cancellation of	65 Receipt of	18 Claims & Benefits	70 Travel
30 To notify	17 Certification of	67 Recovery of	19 Communication	71 Vacation
32 To order	19 Change of	68 Refund of	21 Complaints	73 Vehicles
34 To record/log	20 Charge-off	69 Repair of/Maint.	22 Contracts	74 Vendors
36 To report	21 Charge	70 Replenishment of	23 Correspondence	75 Visitors
38 To request	22 Collection of	71 Requirement of	25 Cost	77 Voucher
40 To schedule/plan	23 Completion of	73 Results of	26 Data Processing/ DP Files	78 Utilities
42 To summarize	25 Compliance	74 Retention of	27 Depreciation	79 Warrants & Checks
44 To transmit/input	26 Computation of	75 Return of	29 Employees	81 Warranty
99 Not elsewhere classified	27 Condition of	76 Routing of	30 Employment	82 Worksheet
	28 Contents of	77 Sale of	31 Fuel	
	29 Correction of	79 Scheduling of	33 Funds	
	31 Cost of	80 Services	34 Furniture & Fixtures	
	32 Creation	81 Status of	35 Grievance	99 Not elsewhere classified
	33 Damage of	82 Termination of	37 Hearing/Trials	
	34 Debit/Credit of/ Balance	83 Testing of/for	38 Insurance	
	35 Deduction of	85 Training of	39 Keys & Locks	
	37 Delinquency of	86 Transfer of	41 Land & Property	
	38 Delivery of	87 Transmittal of	42 Laws/Rules/ Procedures	
	39 Deposit of	88 Transportation of	43 Leases	
	40 Depreciation of	89 Use of	45 Loans & Grants	
	41 Destination of	91 Value of	46 Machinery & Equipment	
	43 Destruction of	92 Verification of	47 Material & Supplies	
	44 Employment of	93 Violation of	49 Meeting	
	45 Encumbrance of	94 Warranty of	50 Orders	
	46 Estimate of	95 Withdrawal of	51 Patients	
	47 Information about	99 Not elsewhere classified		
	49 Inspection of			